

Supplemental information that must be submitted by the Joint Venture applicants to the District Office: (Please complete all items. If items have been covered elsewhere or attached, please note.)

a. Along with the JVA, the Joint Venture applicants must submit the following general identifying information:

- (1) The name of the Joint Venture (the new entity);
- (2) The EIN of the Joint Venture;
- (3) The DUNS number of the Joint Venture;
- (4) The names of the firms participating in the Joint Venture;

b. For each firm involved in the Joint Venture, submit:

- (1) The primary industry of the firm;

Mentor _____
Protégé _____

- (2) The current capabilities of the firm;
- (3) A brief description of the history of the firm;

Mentor _____
Protégé _____

- (4) SBA Form 355 (Application for Small Business Size Determination); and
- (5) SBA Form 1623 (Certification Regarding Debarment, Suspension and other Responsibility Matters).

c. The Joint Venture applicants must submit a description of the project that includes:

- (1) Customer Agency;
- (2) Size and dollar value of project;
- (3) Type of project (general construction, janitorial, etc.);
- (4) Expected award date for the project;
- (5) Duration of project and requirements for performance;
- (6) Copy of the requirement's offer and acceptance letters; and

- (7) Draft or final copy of bid proposal or offer;
- (8) An analysis (prepared by the Joint Venture participants) of the project that describes the anticipated cash flow, personnel, equipment and facility requirements;
- (9) A copy of the Statement of Work; and
- (10) The procurement's FedBizOpps synopsis.

d. For non-8(a) Participants, the Joint Venture applicants must submit:

- (1) The number and value of contracts in the same NAICS code as that assigned to the procurement; and
- (2) Relevant experience and professional licenses, etc.; and
- (3) Details of all previous Joint Ventures with 8(a) firms, including the names of all participants in those JVAs.

e. Each 8(a) Joint Venture participant must indicate the effect the JVA and the contract award will have on their performance of existing contracts in terms of the following:

- (1) Cash flow;
- (2) Personnel;
- (3) Equipment; and
- (4) Facilities.

f. The Joint Venture applicants must outline the distribution of profits for the Joint Venture and must demonstrate that the combined 8(a) Participants will receive at least 51 % percent of the profits earned by the Joint Venture.

g. The Joint Venture applicants must demonstrate that the Joint Venture meets the relevant size requirements, and must analyze the percentages of work to be performed by each firm and each subcontractor. See 13 CFR 124.510, 124.513(d); 125.6.

h. The Joint Venture applicants must submit the following financial information and certifications:

- (1) Documentation indicating the establishment and administration of a special bank account in the name of the Joint Venture.
- (2) Amount and percentage of capital that each Venturer is contributing;

(3) Three years of signed company yearend financial statements and Federal tax returns for each Participant; and

(4) Where appropriate, evidence that the Joint Venture has sufficient bonding.

i. The Joint Venture applicants must submit the following employee information:

(1) A list of the employees needed to perform the project (by position, type and number in each category);

(2) The number and skills of employees supplied to the Joint Venture by each Venturer; and

(3) A brief description of the hiring and employee management responsibilities of each Venturer.

j. The Joint Venture applicants must submit the following concerning project management and administration:

(1) An explanation of how project management will be handled (the managing 8(a) Participant must maintain project management control);

(2) An explanation of the specific responsibilities of the parties with regard to contract performance, source of labor and negotiation of the 8(a) contract; and

(3) A breakdown of work tasks to be performed by each Joint Venturer.

k. The Joint Venture applicants must also submit:

(1) A statement certifying that all the required provisions have been incorporated into the JVA, as set forth in 13 CFR 124.513(c);

(2) A statement certifying that the provisions of the JVA are fair and equitable and will substantially benefit the 8(a) Participant along with an explanation demonstrating this; and

(3) A statement certifying that the 8(a) Participant(s) will bring substantial value to the Joint Venture in terms of resources and expertise other than 8(a) status.